

**NCUA Credit Union Development Workshop
March 10, 2007**

**Grand Hotel Point Clear Resort
Point Clear, AL**

Agenda

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| 8:00 a.m. - 8:30 a.m. | Registration and Continental Breakfast |
| 8:30 a.m. – 9:00 a.m. | NCUA Regional Director – Alonzo Swann III |
| 9:00 a.m. – 9:45 a.m. | Succession Planning
Discuss ways to recruit volunteers and map out a succession plan. A succession plan clearly sets out the factors to be taken into account and the process to be followed in relation to retaining or placing the person. |
| Breakout Session A
10:00 a.m. – 12:00 p.m. | Regulatory Hot Topics
Find out the latest on the Bank Secrecy Act, Office of Foreign Assets Controls, Share Insurance and Information Technology Authentication. |
| Breakout Session B
10:00 a.m. – 12:00 p.m. | Understanding NCUA Risk Indicators and Key Ratios
Discuss what components are included in NCUA Risk Assessment and the importance of understanding your financial statements and key ratios. |
| 12:00 p.m. – 12:45 p.m. | Lunch Provided by NCUA |
| Breakout Session C
1:00 p.m. – 3:00 p.m. | Strategic and Business Planning
Identify the critical components of a strategic business plan and gain a better understanding of the importance of developing the plan so that management can make more informed decisions. During the session, the attendees will be broken into groups and will prepare an outline for a section of the strategic business plan for a sample credit union. |
| Breakout Session D
1:00 p.m. – 3:00 p.m. | Finding your Niche and Marketing to It
Discuss ways to effectively reach potential members and kinds of specialized products that cater to low to moderate income members. Hear marketing options that includes low-cost marketing and promotional activities. |